

9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) (T)

9.1 GENERAL

9.1.1 APPLICABILITY

Universal LifeLine Telephone Service (ULTS), also known as the California LifeLine Program, "California LifeLine" or "LifeLine," is a California Universal Service Public Policy Program that provides discounts on Basic Residential Telephone Service to eligible low-income households pursuant to the Moore Universal Telephone Act and General Order (GO) 153.

California LifeLine discounts are available to eligible customers ordering new, or currently subscribing to, the following basic services: flat rate individual service or measured rate individual service.

9.1.2 TERRITORY

Within the SureWest Telephone exchange area as said area is defined on a map filed as part of the tariff schedules, and the Utility's Service Guide.

9.1.3. DEFINITIONS

The following definitions, as defined by GO 153, apply to the California LifeLine Program used within this Section 9, Universal LifeLine Telephone Service:

- (1) "Anniversary Date" – The Anniversary Date falls on the one-year anniversary of the LifeLine subscriber's Application Date and annually thereafter.
- (2) "Annual LifeLine Notice" – The written notice that each California LifeLine Service Provider annually sends to all of its residential customers regarding the availability, terms, and conditions of California LifeLine.
- (3) "Applicant" – A new or existing voice service customer who has requested California LifeLine and is undergoing the Application Process.
- (4) "Application Date" – The date a new or existing customer calls his/her California LifeLine Service Provider and requests LifeLine service. The "Application Date" serves as the starting point for LifeLine discount back-credits once the California LifeLine Administrator determines eligibility and notifies the applicant's California LifeLine Service Provider.
- (5) "Application Form" – The document sent by the California LifeLine Administrator to applicants that they must fill out (either on paper or online) and return to the California LifeLine Administrator to be considered for California LifeLine eligibility.
- (6) "Application Process" – A process that an applicant must undergo when applying to enroll in California LifeLine.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
9.1 GENERAL – (Cont'd)
9.1.3. DEFINITIONS – (Cont'd)

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- (7) “Basic Residential Telephone Service”, "Basic Service", or "Service" – A class of local telephone service, whose use is for domestic rather than business purposes, furnished to a customer at the customer’s residence.
- (8) “California High Cost Fund B (CHCF-B)” – A fund established by the Commission in D. 96-10-066 for the purpose of subsidizing residential telephone service provided by Carriers of Last Resort (COLRs) in designated high-cost areas of the State.
- (9) “California LifeLine Administrator” – A third-party administrator designated by the Commission to qualify applicants and verify the continued eligibility of subscribers.
- (10) “California LifeLine Program” – A California public purpose program, which is sometimes referred to as “California LifeLine” or “LifeLine.” California LifeLine is a class of local discounted Basic Residential Telephone Service designed to meet the minimum communication needs of low-income residential customers. California LifeLine includes all of the service elements set forth in GO 153, as listed in Section 9.4.1(A), following. California LifeLine is funded by a surcharge on all end users of intrastate telecommunications services for discounted services to eligible customers and reimburses California LifeLine Service Providers that participate in the program, as set forth in this General Order.
- (11) “California LifeLine Service Provider” – A telecommunications carrier (or Non-Traditional Provider such as a wireless provider) that offers Basic Residential Telephone Service and that offers California LifeLine service as defined in General Order 153. SureWest Telephone, the “Utility,” is a “California LifeLine service Provider.”
- (12) “Carrier” – Any provider of end-user intrastate telecommunications services such as local exchange carriers, competitive local carriers, interexchange carriers, commercial mobile radio service carriers, and paging companies.
- (13) “Carrier of Last Resort (COLR)” – A carrier that is required by D. 96-10-066 to provide telephone service, upon request, to all residential and business customers within a designated geographic area. A COLR may be designated as such pursuant to D. 96-10-066, Appendix B, Rule 6.D.1, or voluntarily acquire such status pursuant to D. 96-10-066, Appendix B, Rule 6.D.4.
- (14) “Commission” – The California Public Utilities Commission.
- (15) “Communications Division (CD)” – An division within the Commission that is responsible for carrying out those duties and responsibilities related to California LifeLine that is set forth in General Order 153.

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- 9.1 GENERAL – (Cont’d)
- 9.1.3. DEFINITIONS – (Cont’d)
- (16) “Customer” – An individual that is responsible for ordering, paying for, and making decisions regarding services purchased from a carrier or other service provider in California.
 - (17) “Deadline Date” – The date printed on the customer’s Application or Renewal Form, by which the form and any supporting information must be received by the California LifeLine Administrator to avoid having the form rejected.
 - (18) “Deaf and Disabled Telecommunications Program (DDTP)” – A public purpose program established pursuant to California Public Utilities Code §2881 et seq., to provide persons who are deaf, hard of hearing, or disabled with free telecommunications equipment and services for the purpose of enabling such customers to communicate over the public telephone network.
 - (19) “Denial Date” – During the Application and Renewal Processes, the date upon which the California LifeLine Administrator determines applicants or subscribers to be ineligible.
 - (20) “Deposit” – Money charged to a customer as security to the serving carrier in order to establish or re-establish service as required by the carrier’s applicable terms of service.
 - (22) “Disabled Person” – A person who is qualified to obtain free telecommunications equipment and services through the DDTP pursuant to California Public Utilities Code §2881 et seq.
 - (23) “End-User Common Line (EUCL) Charge” – The Federal Communications Commission (FCC) mandated monthly charge assessed directly on end-users of telecommunications services to recover portion of a carrier’s interstate-allocated cost of the access line, as defined by the FCC, between the carrier’s central office and the end-user’s premises. Also known as the Subscriber Line Charge (SLC).
 - (24) “Flat-Rate Service” – Local telephone service satisfying the requirements of Basic Residential Telephone Service for unlimited local calls without additional charges at a fixed monthly rate.
 - (25) “Household” – Any individual or group of individuals who are living together as one economic unit in the same residence.
 - (26) “Income-Based Criterion” – A means of determining eligibility for California LifeLine based on the number of members in the applicant’s household and corresponding income limit established by the Commission for enrolling in California LifeLine.

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9.1 GENERAL – (Cont'd)
9.1.3. DEFINITIONS – (Cont'd)

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- (27) “Incumbent Local Exchange Carrier (ILEC)” – The definition of ILEC is set forth in Section 251(h) of the Telecommunications Act of 1996. ILECs are each required to serve as a COLR, pursuant to D. 96-10-066, Appendix B, Rule 6.D.1. SureWest Telephone is an ILEC.
- (28) “Intrastate Telecommunication Service” – Any telecommunications service that originates and terminates within the boundaries of the State of California.
- (29) “LifeLine Line” – A single subsidized telephone connection provided by a California LifeLine Service Provider under the California LifeLine Program to a qualifying household.
- (30) “Measured-Rate Service” – Local telephone service satisfying the requirements of Basic Residential Telephone Service for which there is a usage-based charge for some or all local calls.
- (31) “Medical Certificate” – A certificate signed by a medical professional which states that a designated telephone customer has a disability that qualifies the customer for specialized telecommunications equipment from the DDTP. Medical certificates must comply with California Public Utilities Code §2881 et seq.
- (32) “Non-Traditional Providers” – California LifeLine Service Providers that do not hold Certificates of Public Convenience and Necessity (CPCN) from the Commission, including but not limited to wireless and Voice over Internet Protocol (VoIP) services, and voluntarily elect to offer California LifeLine as set forth in this General Order.
- (33) “Program-Based Criterion” – An eligibility based on participation in various means-tested programs approved by the Commission.
- (34) “Public Advisor” – An organizational unit within the Commission that is responsible for carrying out those duties and responsibilities related to California LifeLine as set forth in this General Order.
- (35) “Regular Rates” – A carrier’s or Non-Traditional Provider’s undiscounted rates and charges for telephone services that are applicable to non-California LifeLine residential customers.
- (36) “Renewal Form” – A form sent by the California LifeLine Administrator to existing LifeLine subscribers as part of the Renewal Process that must be completed (either in writing or online) and returned to the California Lifeline Administrator in order to continue receiving their California LifeLine discounts.

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9.1 GENERAL – (Cont'd)
9.1.3. DEFINITIONS – (Cont'd)

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- (37) “Renewal Form (Documentation Required)” – A form sent by the California LifeLine Administrator to existing California LifeLine subscribers as part of the Renewal Process that must be completed in writing (with proof of eligibility) and returned to the California Lifeline Administrator in order to continue receiving their California LifeLine discounts.
- (38) “Renewal Process” – A process that subscribers must undergo annually before their Anniversary Date to continue their enrollment in California LifeLine.
- (39) "Residence" – That portion of an individual house, building, flat, or apartment (a dwelling unit) occupied entirely by a single household as that term is defined by these rules. A room or portion of a dwelling unit occupied exclusively by a household not sharing equally as a member of the domestic establishment may be considered a separate residence for the application of California LifeLine.
- (40) “Service Connection Charge” – A non-recurring charge, for the installation of Basic Residential Telephone Service or the non-regulated residential service provided by a Non-Traditional Provider, that is paid by the customer applying for such service.
- (41) “Service Conversion Charge” – A non-recurring charge, that may be applicable when a customer changes the class, type, or grade of service, such as changing from Measured Rate Service to Flat Rate Service.
- (42) “Subscriber” – A person who is qualified for and receiving California LifeLine service, set forth in this General Order, at his or her principal place of residence.
- (43) “Surcharge” – The percentage increment, as determined by the Commission, which is applied to the end-user’s Intrastate Telecommunications Services.
- (44) “Text-Telephone Device” – A device used by disabled persons to send and receive information over a telephone line in text and graphic forms. A text-telephone device is commonly referred to as a “TTY.”
- (45) “Three-Month Commercial Paper Rate” – The Three-Month Commercial Paper Rate published in the Federal Reserve Statistical Release, G-13.
- (46) “Toll Blocking” – A service whereby the subscriber elects to prevent the completion of outgoing toll calls.
- (47) “Toll Control” – A service whereby the subscriber specifies a certain level of toll usage that may be incurred per month or per billing cycle.
- (48) “Total Household Income” – All revenues, from all members of a household, from whatever source derived, whether taxable or non-taxable, including, but not limited to: wages, salaries, interest, dividends, spousal support and child support, grants, gifts, allowances, stipends, public assistance payments, social security and pensions, rental income, income from self-employment and cash payments from other sources, and all employment-related, non-cash income.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
9.2. NOTICES, ENROLLMENT, AND FORMS
9.2.1 Initial California LifeLine Notice.

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- (A) The Utility shall inform new residential customers calling to establish Basic Service or non-regulated residential service, as applicable, about the availability of California LifeLine, a discount program for customers with a household member currently enrolled in certain public assistance programs or customers with qualifying household income. If customers indicate that they are interested in applying for California LifeLine, the Utility shall contact the California LifeLine Administrator to begin the California LifeLine Application Process for the customer in accordance with Section 9.2.2, Enrollment, following.
- (B) The Utility shall not link the availability of discounted phone service under California LifeLine with the sale of non-California LifeLine services.
- (C) The Utility shall send a confirmation notice to all California LifeLine applicants informing them of the arrival of Application Forms from the California LifeLine Administrator and the requirement to return the completed forms with all required documentation. The notice shall also inform California LifeLine applicants that failure to return the forms and eligibility documentation by the Deadline Date will result in the denial of the application for discounted California LifeLine telephone service.

9.2.2 Enrollment

- (A) The Utility shall ask the customer whether he/she is currently or within the last 30 days has been enrolled in California LifeLine by another California LifeLine Service Provider.
- (1) If yes, the Utility shall then contact the California LifeLine Administrator to validate the customer's approved status. The Utility shall inform the customer that the California LifeLine Administrator will notify the customer and the customer's current California LifeLine Service Provider once it determines whether or not the customer is currently or within the last 30 days has been enrolled in California LifeLine. If the California LifeLine Administrator cannot confirm the customer's continued eligibility, the customer will be treated as a new California LifeLine applicant and be subject to the Application Process.
- (2) If no, the Utility shall ask the customer if any member of his/her household is enrolled in a public assistance program.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
- 9.2. NOTICES, ENROLLMENT, AND FORMS – (Cont'd)
- 9.2.2 Enrollment – (Cont'd)
- (A) (Cont'd)
- (2) (Cont'd)
- (a) If yes, the Utility shall read the means-tested programs listed in Section 9.3.1(E), following, and ask the customer whether any household member is enrolled in any of these programs. The Utility may use the step-down approach when reading the means-tested programs and stop when the customer confirms that a household member is enrolled in an approved program.
- (1) If the customer verbally indicates participation in an approved public program, immediately the Utility shall contact the California LifeLine Administrator to begin the Application Process and inform the customer that: (i) the customer will receive an Application Form in the mail, sent from the California LifeLine Administrator; (ii) the Application Form must be completed and signed by the person whose name appears on the form and returned to the California LifeLine Administrator before the due date indicated on the form; and (iii) specify any deposits required; (iv) a payment plan is available for nonrecurring charges and deposits relating to basic service, and (v) the California LifeLine Administrator will notify the customer and the customer's California LifeLine Service Provider once it determines whether or not the customer is eligible for California LifeLine.
- (b) If no, the Utility shall ask the customer about his/her household size and read the corresponding California LifeLine income limit information outlined in Section 9.3.1(D), following, that the applicant must meet in order to qualify for California LifeLine.
- (1) If the customer verbally indicates that he/she is eligible under the income guidelines, the Utility shall immediately contact the California LifeLine Administrator to begin the California LifeLine Application Process for the customer. The Utility shall also inform the customer that he/she must also provide income document(s) substantiating the household income, and inform the customer that: (i) the customer will be receiving an Application Form in the mail from the California LifeLine Administrator; (ii) the Application Form must be completed and signed by the person whose name appears on the form, and returned to the California LifeLine Administrator before the due date indicated on the form;

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd) (T)
- 9.2. NOTICES, ENROLLMENT, AND FORMS – (Cont'd)
- 9.2.2 Enrollment – (Cont'd)
- (A) (Cont'd)
- (2) (Cont'd)
- (b) (Cont'd)
- (1) (Cont'd) (iii) a copy of the supporting income document(s) that reflect total household income must be included with the Application Form; (iv) a payment plan is available for nonrecurring charges and deposits relating to basic service; and (v) the California LifeLine Administrator will notify the customer and the Utility once it determines whether or not the customer is eligible for California LifeLine.
- (B) The Utility must inform the applicant that he or she may opt to receive the instructions for the Application Form in Braille (English Only) or instructions and Application Form in large print.
- (C) The Utility shall inform the customer of the availability of two California LifeLine lines if a member of the household uses a TTY when making a call,
- (1) If the customer verbally certifies that he/she qualifies for two California LifeLine lines, the Utility shall immediately contact the California LifeLine Administrator to begin the California LifeLine Application Process for the second California LifeLine line and remind the customer that he/she must provide proof for the need of a Text-Telephone (TTY) or a 2-line Captioned Telephone (CapTel) device as outlined in Section 9.3.1(G)(1), following.
- (D) The Utility shall inform California LifeLine applicants that they will incur Basic Service rates and charges until approval of their California LifeLine Application Form. The Utility shall offer California LifeLine applicants a payment plan for the non-recurring charges and deposits for Basic Service, and shall inform applicants of the existence of such plans.
- (E) The Utility shall inform California LifeLine applicants that once approved, they will receive a credit on their bill for California LifeLine discounts retroactive to their Application Date. If they have a net credit balance of at least \$10.00 on their next bill, they may request a refund check for any such net credit balance from their respective California LifeLine Service Provider.
- 9.2.3 Annual California LifeLine Notice
- (A) The Utility shall annually send to all of its residential customers, other than customers of foreign exchange, a notice that contains information about the availability, terms, and conditions of California LifeLine. (T)

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
9.2. NOTICES, ENROLLMENT, AND FORMS – (Cont'd)
9.2.3 Annual California LifeLine Notice – (Cont'd)
(A) (Cont'd)
(1) The annual notice shall include information about the availability, terms, and conditions of two California LifeLine lines for qualified disabled persons.
(2) The Utility shall submit its annual notice to the Commission Public Advisor (PA) for the PA's review and approval. Once approved, the Utility does not need to resubmit its annual notice to the PA unless there is a material change to the notice. A change to the annual notice to reflect the annual adjustment to California LifeLine income eligibility limits is not a material change to the notice.

9.2.4 Customer Application Form

- (A) The California LifeLine Administrator will provide applicants with the Application Form, which must be completed when customers apply to enroll in California LifeLine.
(1) A copy of the Application Form and associated instructions can be found at www.californialifeline.com.
(a) The instructions must inform California LifeLine applicants that the Commission or the California LifeLine Administrator may audit the subscriber's eligibility to participate in California LifeLine. The instructions shall also state that if the audit established that the subscriber is ineligible, the subscriber will be removed from California LifeLine and billed for previous California LifeLine discounts that the subscriber should not have received plus interest at the Three-Month Commercial Paper Rate, as published in the Federal Reserve Statistical Release, G-13.
(b) The instructions must inform California LifeLine applicants that submitted income and/or supporting documentation will not be returned.
(2) The Application Form will be partially completed by the California LifeLine Administrator based on information provided by California LifeLine Service Providers.
(3) Pursuant to 47 C.F.R. §54.410(d), Applicants must provide their date of birth and last four digits of their social security number on the Application Form provided by the California LifeLine Administrator. (N)
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(N)

9.2.5 Subscriber Renewal Form

- (A) The California LifeLine Administrator will provide a Renewal Form to Subscribers, which Subscribers must complete a Renewal Form annually prior to their Anniversary Date to verify continued eligibility in California LifeLine.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
9.2. NOTICES, ENROLLMENT, AND FORMS – (Cont'd)
9.2.5 Subscriber Renewal Form – (Cont'd)
(A) (Cont'd)

(1) A copy of the Renewal Form and associated instructions can be found at www.californialifeline.com.

(a) The instructions must inform California LifeLine subscribers that the Commission or the California LifeLine Administrator may audit the subscriber's eligibility to participate in California LifeLine. The instructions shall also state that if the audit established that the subscriber is ineligible, the subscriber will be removed from California LifeLine and billed for previous California LifeLine discounts that the subscriber should not have received plus interest at the Three-Month Commercial Paper Rate, as published in the Federal Reserve Statistical Release, G-13.

(b) The instructions must inform LifeLine subscribers that submitted income and/or supporting documentation will not be returned.

(2) The Renewal Forms will be partially completed by the California LifeLine Administrator based on information provided by California LifeLine Service Providers.

(3) Pursuant to 47 C.F.R. §54.410(f), LifeLine subscribers must provide their date of birth and last four digits of their social security number on the Renewal Form provided by the California LifeLine Administrator.

(N)
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(N)

9.2.6 California LifeLine Notices, Forms and Instructions in the Language of Sale

(A) The languages currently supported by the California LifeLine program are English, Spanish, Chinese (Mandarin and Cantonese), Korean, Vietnamese, Tagalog, Japanese, and English Braille. All supported languages (except for Braille) are available in Large Print.

(B) With the exception of those sales where the applicant, subscriber or Utility requested the use of an outside translation service, any California LifeLine Service Provider that sells California LifeLine in a language other than English shall provide those subscribers to whom it sold California LifeLine in a language other than English with the following:

(1) Commission-managed California LifeLine notices in the language in which the California LifeLine Service Provider originally sold California LifeLine to the subscriber.

(2) Toll-free access to customer service representative who are fluent in the language in which the California LifeLine Service Provider originally sold California LifeLine to the subscriber.

(3) California LifeLine Service forms and instructions in the language in which the California LifeLine Service Provider originally sold California LifeLine to the applicant and/or subscriber.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd) (T)
- 9.2. NOTICES, ENROLLMENT, AND FORMS – (Cont'd)
- 9.2.7 Changes to LifeLine Service Offering - California LifeLine Service Providers making changes to their California LifeLine service offering and must give 30 days notice to their California LifeLine subscribers for any of the following reasons:
- (A) Increases to the California LifeLine rate pursuant to Section 8 and Public Utilities Code §874(a)
 - (B) Price increases or service restrictions to its California LifeLine service
 - (C) Withdrawal of California LifeLine service participation. The Utility must comply with General Order 96-B industry noticing requirements.
- 9.3 ELIGIBILITY CRITERIA FOR OBTAINING AND RETAINING LIFELINE
- 9.3.1 CRITERIA - California LifeLine is available to any residential customer who meets all of the following eligibility requirements:
- (A) The residence at which the service is requested is the subscriber's principal place of residence. An applicant for California LifeLine service may report only one address in this state as his/her principal place of Residence.
 - (B) The subscriber and members of the subscriber's household collectively have one discounted service from either the California LifeLine program or the federal Lifeline low income program (Non-Traditional Providers only), except as provided for in this Section.
 - (C) The customer's eligibility meets either the Income-Based Criterion or the Program-Based Criterion.
 - (D) Income-Based Criterion
The applicant's current total household income does not exceed the following income levels (based on household size) for the fiscal year for which the service is furnished, i.e. members of the applicant's household collectively earn no more than the following amount of annual income: (T)

<u>HOUSEHOLD SIZE</u>	<u>INCOME LIMITATION¹</u>
1-2	
3	
4	
For each additional member of household	

NOTE 1: Refer to Pacific Bell Telephone Company (d.b.a. AT&T California) Network and Exchange Service Tariff, Schedule A5, Universal LifeLine Telephone Service, for Income-Based Criterion. (L)

(L) Formerly appeared on Sheet 252

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
- 9.3 ELIGIBILITY CRITERIA FOR OBTAINING AND RETAINING LIFELINE – (Cont'd)
- 9.3.1 CRITERIA - California LifeLine is available to any residential customer who meets all of the following eligibility requirements: - (Cont'd)
- (D) Income-Based Criterion – (Cont'd)
- (1) The income used to determine eligibility for the income-based California LifeLine program shall be based on Total Household Income, as in defined in Section 9.1.3, preceding.
 - (2) For households with self-employed members, the “income from self-employment” shown on IRS form 1040, Schedule C, line 29, shall be used to assist in the determination of whether a California LifeLine applicant is eligible to participate in California LifeLine.
 - (3) Borrowed money does not constitute income when determining eligibility for the California LifeLine program.
 - (4) Funds transferred from one account to another, such as from savings account to a checking account, do not constitute income when determining eligibility for the California LifeLine program, even if such funds are used for living expenses.
 - (5) Applicants must also provide proof of their income documentation substantiating his/her Total Household Income. Acceptable income documents are:
 - (a) Prior year’s state, federal, or tribal tax return
 - (b) Current income statement from an employer or paycheck stub for three consecutive months worth of the same type of statements within the last 12 months
 - (c) Statement of benefits from Social Security, Veterans Administration
 - (d) Statement of benefits from retirement/pension, Unemployment/ Workmen’s Compensation
 - (e) A divorce decree
 - (f) Child support document
 - (g) Other official documents.
- (E) Program-Based Criterion
- Allows an applicant to enroll in California LifeLine based on the applicant or a member of the applicant’s Household in a means-tested programs approved by the Commission.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd) (T)
- 9.3 ELIGIBILITY CRITERIA FOR OBTAINING AND RETAINING LIFELINE – (Cont'd)
- 9.3.1 CRITERIA - California LifeLine is available to any residential customer who meets all of the following eligibility requirements: - (Cont'd)
- (E) Program-Based Criterion – (Cont'd)
- Approved means-test programs are:
- (1) Medicaid or Medi-Cal
 - (2) CalFresh Program, formerly known as “Food Stamps”
 - (3) Supplemental Security Income
 - (4) Federal Public Housing Assistance or Section 8
 - (5) Low Income Home Energy Assistance Program (LIHEAP)
 - (6) Temporary Assistance for Needy Families (TANF), known in California under the following names:
California Work Opportunity and Responsibility to Kids (CalWORKs)
Stanislaus County Work Opportunity and Responsibility to Kids (StanWORKs)
Welfare-To-Work (WTW)
Greater Avenues for Independence (GAIN)
 - (7) National School Lunch Program (NSLP)
 - (8) Tribal TANF
 - (9) Bureau of Indian Affairs General Assistance
 - (10) Head Start Income Eligible (Tribal Only)
 - (11) Healthy Families Category A
 - (12) Women, Infants and Children Program (WIC)
- (F) No customer who is claimed as a dependent on another person’s income tax return shall be eligible for California LifeLine.
- (G) No member of a subscriber's family, residence or household who resides with the subscriber is eligible for California LifeLine, except as provided as follows:
- (1) A subscriber shall be eligible to receive two (2) California LifeLine lines if: a) the subscriber meets all California LifeLine eligibility criterion set forth in this Schedule, b) a member of the subscriber’s household is disabled and has immediate and continuous access within the household to either a Text-Telephone (TTY) or a 2-line Captioned Telephone (CapTel) devise ; and c) the TTY or CapTel devise is issued by the DDTP or a medical certificate indicating the household member’s need for a TTY or CapTel devise is submitted. (T)

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd) (T)
- 9.3 ELIGIBILITY CRITERIA FOR OBTAINING AND RETAINING LIFELINE – (Cont'd)
- 9.3.1 CRITERIA - California LifeLine is available to any residential customer who meets all of the following eligibility requirements: - (Cont'd)
- (G) (Cont'd)
- (2) All California LifeLine rules and regulations that apply to one California LifeLine line shall apply equally to the second California LifeLine line provided to the subscriber.
- (3) An applicant whose California LifeLine application is rejected for not being a member of a means-tested program as listed in this Section 9.3.1(E), preceding, who can demonstrate membership by a member of the subscriber's household in a county-equivalent means-test program can appeal the decision of the California LifeLine Administrator with the Commission Consumer Affairs Branch (CAB).
- 9.3.2 ENROLLMENT
- (A) No California LifeLine Service Provider shall knowingly enroll into California LifeLine an applicant who does not meet the California LifeLine eligibility criteria. No California LifeLine Service Provider shall knowingly allow a subscriber to remain in California LifeLine who does not meet the California LifeLine eligibility criteria.
- (B) Each applicant enrolling in California LifeLine is subject to the Application Process described below:
- (1) Upon receiving the Application Form from the California LifeLine Administrator, the customer has the option of enrolling in California LifeLine under either: (i) the Program-Based Criterion, or (ii) the Income-Based Criterion.
- (2) If the applicant has a household member currently enrolled in any of the means-tested programs listed in Section 9.3.1(E), preceding, the customer should enroll under the Program-Based Criterion and complete the section of the Application Form entitled "Method 1 Program-Based."
- (3) If the customer does not have a household member currently enrolled in any of the means-tested programs listed in Section 9.3.1(E), preceding, the customer must enroll under the Income-Based Criterion listed in Section 9.3.1(D), preceding, and complete the section of the Application Form entitled "Method 2 Income-Based."
- (C) The Application Form shall be signed by the applicant whose name appears on the California LifeLine Service Provider's account, the customer's legal guardian or a person operating pursuant to a power of attorney for such customer.
- (1) By signing the form, the customer is certifying, under penalty of perjury, that the information contained in the completed form and submitted documents, if any, are true and correct. (T)

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
9.3 ELIGIBILITY CRITERIA FOR OBTAINING AND RETAINING LIFELINE – (Cont'd)
9.3.2 ENROLLMENT – (Cont'd)

(T)

- (D) The completed Application Form and supporting documents, if any, must be received by the California LifeLine Administrator on or before the Deadline Date specified in the Application Form.
- (E) Any applicant who fails to return the Application Form or otherwise fails to qualify for California LifeLine as specified on the Application Form by the Deadline Date shall have their application rejected.
- (F) A subscriber changing his/her California LifeLine Service Provider shall not be required to undergo the Application Process, provided that the subscriber initiates California LifeLine service with his/her new California LifeLine Service Provider within 30 days of disconnecting California LifeLine service with the previous California LifeLine Provider and the subscriber maintains eligibility in all other respects. If a subscriber changes his or her principal place of residence, while maintaining eligibility in all other respects, the subscriber shall not be required to go through the Application Process again.
- (G) Upon successful completion of the Application Process, the subscriber's Basic Service will be converted to California LifeLine service and the subscriber's account will be credited the difference between California LifeLine rates and charges as outlined in Section 9.5.2, following, and regular rates and charges as outlined in the Utility's tariff and Service Guide, and any deposits related to basic service, as of the California LifeLine subscriber's Application Date. Subscribers with a net credit balance of at least \$10.00 reflected on their next bill may request a refund check in the amount of such net credit balance from their California LifeLine Service Provider.

9.3.3 RENEWAL

- (A) To remain in California LifeLine, each California LifeLine subscriber is subject to the annual Renewal Process described below:
- (1) Upon receiving the Renewal Form, the subscriber has the option of qualifying his/her continued eligibility under either: (i) the Program-Based Criterion, or (ii) the Income-Based Criterion.
- (a) If the subscriber has a household member currently enrolled in any of the means-tested programs listed in Section 9.3.1(E), preceding, the subscriber should continue his/her California LifeLine enrollment under the Program-Based Criterion and complete the section of the Renewal Form entitled "Method 1 Program-Based."

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
- 9.3 ELIGIBILITY CRITERIA FOR OBTAINING AND RETAINING LIFELINE – (Cont'd)
- 9.3.3 RENEWAL – (Cont'd)
- (A) (Cont'd)
- (1) (Cont'd)
- (b) If the subscriber does not have a household member currently enrolled in any of the means-tested programs listed in Section 9.3.1(E), preceding, the subscriber *must* continue his/her California LifeLine enrollment under the Income-Based Criterion listed in Section 9.3.1(D), preceding, and complete the section of the Renewal Form entitled “Method 2 Income-Based”.
- (2) The Renewal Form shall be signed by the subscriber whose name appears on the California LifeLine Service Provider’s account, the subscriber’s legal guardian or a person operating pursuant to a power of attorney for the subscriber.
- (a) By signing the form, the subscriber is certifying, under penalty of perjury, that the information contained in the completed form and all submitted documents, if any, are true and correct.
- (3) The completed Renewal Form must be received by the California LifeLine Administrator on or before the due date specified on the Renewal Form.
- (a) If the subscriber receives a “Renewal Form (Documentation Required),” the completed form with all supporting documents must be received by the California LifeLine Administrator on or before the due date specified on the Renewal Form.
- (4) Any subscriber who fails to qualify for continued eligibility in California LifeLine shall be removed from the California LifeLine Program. Upon notification from the California LifeLine Administrator, the Utility shall convert the subscriber to Basic Residential Service starting with the Denial Date provided by the California LifeLine Administrator. No Service Conversion Charges shall be billed to the customer for this change in service.
- (5) Applicants who wish to re-establish California LifeLine service after removal from California LifeLine will be treated as a new applicant, subject to the Application Process pursuant to Section 9.2.2, preceding, and a Service Conversion Charge (once the applicant has successfully re-established California LifeLine service). The California LifeLine discount will be effective on the Application Date, and not be applied retroactively to the prior enrollment period.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd) (T)
- 9.3 ELIGIBILITY CRITERIA FOR OBTAINING AND RETAINING LIFELINE – (Cont'd)
- 9.3.4 NOTIFICATION OF CHANGE - California LifeLine subscribers must notify the Utility of any change that causes the California LifeLine subscriber to no longer qualify for (i) California LifeLine, or (ii) a second California LifeLine line. Upon receipt of notification, the Utility will change the subscriber's California LifeLine service to Basic Residential Telephone Service. No Service Conversion Charges shall be billed to the customer for this change in service.
- (A) The Utility may require a deposit, if applicable.
- 9.3.5 AUDITS - The Commission and/or the California LifeLine Administrator may audit and verify a subscriber's eligibility to participate in the California LifeLine Program.
- (A) Any California LifeLine subscriber who is found to be ineligible to participate in the California LifeLine Program shall be removed from California LifeLine.
- (1) Upon notification from the Commission or the California LifeLine Administrator, the Utility shall change the ineligible subscriber's California LifeLine account to Basic Service and apply regular rates. Such notification shall specify the effective date of the change, (based on the Denial Date). No Service Conversion Charges shall be billed to the subscriber for this change in service.
- (a) The Utility may require a deposit, if applicable.
- (B) The Utility may bill the ineligible subscriber for any California LifeLine discounts that the subscriber should not have received, plus interest determined in accordance with the Three-Month Commercial Paper Rate.
- 9.3.6 DISPUTES - Customers may dispute the California LifeLine Administrator's finding of ineligibility by submitting an Informal Appeal to the Commission's Consumer Affairs Branch (CAB) in writing to "CPUC Informal Complaints," 505 Van Ness Ave., San Francisco, CA 94102; or on the internet/web at <http://www.cpuc.ca.gov/PUC/aboutus/Divisions/CSID/Consumer+Affairs/>.
- (A) If the California LifeLine Administrator's determination of ineligibility is overturned on appeal, Lifeline discounts shall be applied retroactive to the Application Date for a new subscriber or the Anniversary Date for a renewing subscriber.
- 9.3.7 APPEALS - A California Lifeline applicant whose appeal with the Commission's Consumer Affairs Branch is denied and who wishes to pursue the matter further, may file a formal complaint with the Commission. Information on the Consumer Affairs Branch and how to file a formal complaint shall be displayed at: <http://www.cpuc.ca.gov/PUC/aboutus/Divisions/CSID/Consumer+Affairs/>. (T)

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd) (T)(L¹)
- 9.4 SERVICE ELEMENTS, SERVICE DEPOSITS & SERVICE REQUIREMENTS OF CALIFORNIA LIFELINE
- 9.4.1 SERVICE ELEMENTS AVAILABLE UNDER CALIFORNIA LIFELINE
- (A) All California LifeLine Service Providers offering California LifeLine service shall offer their subscribers all of the service elements as set forth following: (T)
- (1) Access to (1) single party local exchange service, or (2) service that is equivalent, in all substantial respects, to single party local exchange service.
 - (2) Access to all interexchange carriers offering service in the California LifeLine subscriber's local exchange.
 - (3) Ability to place calls.
 - (4) Ability to receive free unlimited incoming calls.
 - (5) Free touch-tone dialing.
 - (6) Free unlimited access to 911/E-911.
 - (7) Access to local directory assistance (DA). The Utility shall offer its California LifeLine subscribers the same number of free DA calls that the Utility provides to its non-California LifeLine residential customers. (L¹)
 - (8) Access to foreign Numbering Plan Areas. (L²)
 - (9) California LifeLine rates and charges.
 - (10) Customer choice of flat-rate local service or measured-rate local service with the same allowance covered under the Utility's available local plans. (C)
 - (11) Free provision of one directory listing per year as provided for in D.96-02-072.
 - (12) Free white pages telephone directory.
 - (13) Access to operator service.
 - (14) Voice grade connection to the public switched telephone network.
 - (15) Free access to 800 or 800-like toll-free services. (D)
 - (16) Access to telephone relay services as provided for in Public Utilities Code §2881 et seq.
 - (17) Toll-free access to customer service for information about California LifeLine, service activation, service termination, service repair, and bill inquiries. (L²)

(L¹) Formerly appeared on Sheet 248

(L²) Formerly appeared on Sheet 249

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd) (T)
- 9.4 SERVICE ELEMENTS, SERVICE DEPOSITS & SERVICE REQUIREMENTS OF CALIFORNIA LIFELINE – (Cont'd)
- 9.4.1 SERVICE ELEMENTS AVAILABLE UNDER CALIFORNIA LIFELINE (T)(L¹)
- (A) (Cont'd)
- (18) Toll-free access to customer service representatives fluent in the same language (English and non-English) in which California LifeLine was originally sold.
 - (19) Free access to toll-blocking service.
 - (20) Free access to toll-control service, but only if (1) the Utility is capable of offering toll-control service, and (2) the California LifeLine subscriber has no unpaid bill for toll service.
 - (21) Access to two residential telephone lines if a low-income household with a disabled person requires both lines to access California LifeLine. (L¹)
 - (22) Free access to the California Relay Service via the 711 abbreviated dialing code. (L²)
- 9.4.2 California LifeLine does not provide discounts on optional services and equipment. Optional services and equipment are available to subscribers participating in California LifeLine at applicable rates and charges as set forth in the Utility's Service Guide. Non-California LifeLine lines will be available to California LifeLine subscribers at the applicable regular rates and charges, as set forth in this tariff, and in the Utility's Service Guide. (L²)
- 9.4.3 California LifeLine is restricted to residential customers who meet the criteria set forth in Section 9.3.1, preceding. (T)
- 9.4.4 LifeLine is restricted to residential service. Foreign exchange, farmer lines, and other non- LifeLine services are excluded from this offering.
- 9.4.5 In accordance with this tariff Schedule Cal. P.U.C. No. 1-L, Section 2.1.6, Rule 6, "Establishment and Re-Establishment of Credit," and Section 2.1.7, Rule 7, "Deposits," the Utility may require customers to post a deposit upon service initiation. However, upon notification of California LifeLine eligibility from the California LifeLine Administrator, the Utility must credit the deposit for Basic Service on the subscriber's bill statement (if applicable). In accordance to the Utility's above sited tariff Schedule and Rules, the Utility may require a deposit for other services ordered by the California LifeLine subscriber.
- 9.4.6 The Utility may require a California LifeLine subscriber to pay any overdue California LifeLine rates and charges incurred by that subscriber, or make payment arrangements, before California LifeLine is reinstated at the same or new address. (T)
- (L¹) Formerly appeared on Sheet 249
(L²) Formerly appeared on Sheet 250

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd) (T)
- 9.4 SERVICE ELEMENTS, SERVICE DEPOSITS & SERVICE REQUIREMENTS OF CALIFORNIA LIFELINE – (Cont'd)
- 9.4.7 Other than previously stated, California LifeLine is subject to the conditions of “Discontinuance and Restoration of Service” as set forth in the Utility’s tariff, Schedule Cal. P.U.C. No. 1-L, Section 2.1.11, "Discontinuance and Restoration of Service," or Schedule of Rates and Charges related to service termination and reconnection.
- 9.4.8 If a subscriber is disconnected for nonpayment of toll charges, a California LifeLine Service Provider must provide California LifeLine to the subscriber if the subscriber elects to receive Toll Blocking.
- 9.5 CALIFORNIA LIFELINE RATES AND CHARGES
- 9.5.1 The Utility shall offer California LifeLine priced at the following rates and charges:
- (A) Discounted nonrecurring Service Connection Charge for the initial installation or activation of a single telephone connection at the LifeLine subscriber’s principal place residence.
- (1) The California LifeLine Service Connection Charge shall equal the lowest of (i) \$10.00, or (ii) 50% of the California LifeLine Service Provider’s Service Connection Charge. The California LifeLine Service Connection Charge is set forth in Section 9.5.2(B), following.
- (2) The California LifeLine Service Connection Charge is applicable to each eligible household residing at the same principal place of residence.
- (3) The California LifeLine Service Connection Charge may be applicable any time a subscriber (i) establishes a new telephone connection (ii) re-establishes California LifeLine at the same principal place of residence at which California LifeLine was previously provided, (iii) establishes California LifeLine at a new principal place of residence, or (iv) switches California LifeLine from one California LifeLine Service Provider to another.
- (4) California LifeLine Service Providers may not impose a “central office charge” in addition to the California LifeLine Service Connection Charge when installing or activating California LifeLine.
- (5) Installation of a second and subsequent telephone service connection shall be subject to the Utility’s Service Connection Charge at regular rates, except that subscribers with a disabled household member may qualify for California LifeLine Service Connection Charges on two residential telephone connections as per General Order 153. For Service Connection Charges at the Utility’s regular rates, see the Utility’s Service Guide. (T)

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
- 9.5 CALIFORNIA LIFELINE RATES AND CHARGES – (Cont'd)
- 9.5.1 The Utility shall offer California LifeLine priced at the following rates and charges: - (Cont'd)
- (B) Deferred payment of the California LifeLine Service Connection Charge.
- (1) The Utility shall offer California LifeLine subscribers the option of paying the California LifeLine Service Connection Charge in equal monthly installments with no interest for a period not to exceed 12 months.
- (2) The Utility may charge a late-payment fee when California LifeLine subscribers fail to timely remit some or all of the California LifeLine Service Connection Charge under a deferred-payment schedule.
- (C) Discounted nonrecurring charge for Service Conversion Charge.
- (1) The California LifeLine Service Conversion Charge (if applicable) shall equal the lowest of (i) \$10.00, (ii) 50% of the Utility's Service Connection Charge at regular rates for the initial connection of a single residential telephone line or (iii) the California LifeLine Service Provider's Service Conversion Charge. The California LifeLine Service Conversion Charge is set forth in Section 9.5.2(C), following.
- (2) The California LifeLine Service Conversion Charge is applicable each time a California LifeLine subscriber affects a change in the class, type, or grade of service, including requests to change from Foreign Exchange Service. There is no limit on the number of times a California LifeLine subscriber may pay the California LifeLine Service Conversion Charge when he or she initiates a change in the class, type, or grade of service.
- (3) No conversion charge may be assessed on an applicant or claimed from the California LifeLine fund if a California LifeLine applicant fails to qualify. No conversion charge shall be assessed on a subscriber or claimed from the California LifeLine fund if a subscriber is removed from California LifeLine (either voluntarily or involuntarily).
- (D) Discounted monthly California LifeLine rate for Flat Rate Service.
- (1) The California LifeLine Flat-Rate Service rate is set forth in Section 9.5.2(A)(1), following.
- (2) From the effective date of D. 10-11-033 until December 31, 2012, California LifeLine subscribers of LifeLine Flat-Rate Service pay no more than \$6.84 per month, and no less than a price floor of \$5.00.
- (3) Beginning January 1, 2013, California LifeLine subscribers will pay no more than ½ their California LifeLine Service Provider's Flat Rate Service.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
- 9.5 CALIFORNIA LIFELINE RATES AND CHARGES – (Cont'd)
- 9.5.1 The Utility shall offer California LifeLine priced at the following rates and charges: - (Cont'd)
- (D) Discounted monthly California LifeLine rate for Flat Rate Service – (Cont'd).
 - (4) From the effective date of D. 10-11-033 until December 31, 2012, the California LifeLine Flat-Rate Service will have a price floor of \$5.00.
 - (5) Subscribers to California LifeLine Flat Rate Service shall receive unlimited local calling.
 - (E) Discounted monthly California LifeLine Measured Rate Service.
 - (1) The California LifeLine Measured-Rate Service rate is set forth in Section 9.5.2(A)(2), following.
 - (2) From the effective date of D. 10-11-033 until December 31, 2012, California LifeLine subscribers of LifeLine measured rate service will pay no more than \$3.66 per month, and no less than a price floor of \$2.50.
 - (3) Beginning January 1, 2013, California LifeLine subscribers will pay no more than ½ their California LifeLine Service Provider's Measured Rate Service rate
 - (4) From the effective date of D. 10-11-033 until December 31, 2012, LifeLine Measured Rate Service will have a price floor of \$2.50.
 - (5) Subscribers of California LifeLine Measured-Rate Service shall receive 60 untimed local calls per month. The California LifeLine Service Provider shall charge \$0.08 per call for each local call in excess of 60 calls per month.
 - (F) Subscribers shall not be charged for the federal End User Common Line (EUCL) charge, also known as the Subscriber Line Charge (SLC).
 - (G) Subscribers shall not be charged for Toll-Limitation Service (including, but not limited to, Toll Blocking or Toll Control).
 - (H) There shall be no charge or related credits to California LifeLine subscribers' LifeLine service for surcharges including the following: California High Cost Fund A (CHCF-A) surcharge, California High Cost Fund B (CHCF-B) surcharge, California Teleconnect Fund (CTF) surcharge, California Relay Service and Communications Device Fund surcharge (DDTP), the California LifeLine (ULTS) surcharge, the California Advanced Services Fund (CASF) surcharge, and the CPUC User fee.
 - (1) These surcharges will apply to any other intrastate telecommunications services purchased by California LifeLine subscribers, as required by law.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
- 9.5 CALIFORNIA LIFELINE RATES AND CHARGES – (Cont'd)
- 9.5.1 The Utility shall offer California LifeLine priced at the following rates and charges: -
(Cont'd)
- (H) (Cont'd)
- (2) The Utility shall pay to the appropriate taxing authorities the applicable taxes, fees, and surcharges billed to California LifeLine subscribers and claimed against the California LifeLine Fund.
- (I) The Utility may require advance payments for California LifeLine service, not to exceed one month's rates and charges.
- (J) Optional service features, network services, and equipment that are not part of California LifeLine rates and charges, will be available to subscribers at the California LifeLine Service Provider's regular rates and charges.
- (1) Non-California LifeLine lines and services will be available to subscribers at the applicable regular rates and charges.
- (a) California LifeLine shall not apply to the purchase of any additional, non-California LifeLine lines, services, features, options, and network capabilities by California LifeLine subscribers.
- (K) Except as specifically modified by General Order 153, all rules, regulations, rates and charges in conjunction with Utility's tariffs/service guides or terms and conditions applicable to non-California LifeLine services are also applicable to the service provided under California LifeLine.

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9. UNIVERSAL LIFELINE TELEPHONE SERVICE (California LifeLine) – (Cont'd)
 9.5 CALIFORNIA LIFELINE RATES AND CHARGES – (Cont'd)
 9.5.2 RATES AND CHARGES

	<u>Monthly Rate per Line</u>	
(A) BASIC EXCHANGE SERVICE ¹		
(1) <u>California LifeLine Flat-Rate Service</u>		
Local Flat-Rate Service ²	\$19.99	
End User Common Line (EUCL) Charge	6.50	
Federal LifeLine Support Amount Credit	9.25	
California Specific Support Amount Credit	11.85	(I)
California LifeLine Flat-Service Rate	\$5.39	(R)

California LifeLine Flat-Rate Service includes unlimited local calling.
 Local Calling Areas are found in this tariff, Section 3.3.1(A), preceding.

(2) <u>California LifeLine Measured-Rate Service</u>	
Local Measured-Rate Service ²	\$13.99
End User Common Line (EUCL) Charge	6.50
Federal LifeLine Support Amount Credit	9.25
California Specific Support Amount Credit	8.74
California LifeLine Measured-Service Rate	\$2.50

California LifeLine Measured-Rate Service is provided with a monthly allowance of 60 untimed outbound Local Calls. Local Calling Areas are listed in Section 3.3.1(A), preceding. Local Calls up to and over this allowance are provided at all days and hours at the following rate:

	<u>Rate per Call</u>
<u>Originating Untimed Local Calls</u>	
0-60	\$0.00
Over 60	\$0.08

Note 1: Applies to Roseville Base Rate Area and Citrus Heights District Rate Area.

Note 2: See Section 3, Basic Exchange Access Service, for regular rates contained in this tariff.

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